THE MARKET FOR LIVE THEATRE, OPERA & BALLET IN SELECTED US STATES & CITIES

NOW AND THEN

Ontario Ministry of Tourism & Recreation
Tourism Branch
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Ontario

TAMS
Travel Activities & Motivation Survey

INTRODUCTION

During the fall of 1999 and the winter of 2000, the Ministry of Tourism and Recreation in partnership with tourism organizations across Canada conducted two household surveys to determine the travel behaviour and characteristics of Canadian and US residents (Travel Activities and Motivation Survey - TAMS). The Canadian survey consisted of 18,385 and the US of 28,397 telephone interviews.

Subsequently, the Ministry projected the 1999/2000 databases to the year 2026 for Canada and to 2025 for the US using population projections from Statistics Canada and the US Bureau of Census.

This report presents a profile of the live theatre, opera and ballet market in selected US states and cities at the end of 1999, as well as some estimates on how this market will change in 2025[1].

TAMS collected data not only on US residents' travel habits, but also on their habits at home when they are not travelling. A list of activities was presented and respondents were asked: "***I'd like to get an idea of the things you personally do for day-to-day recreation and entertainment when you are not travelling. In the past year or so,...did you participate frequently, occasionally, rarely or did not participate at all in the following activities***". Going to live theatre, opera and ballet were among the activities on the list.

The total telephone sample for each state and city is presented below along with the sample of those who said that they go to live theatre, opera or ballet frequently or occasionally:

[1] For details on the methodology as well as an overview of how the total US and Canadian markets will look like in 2026 please visit our web site at: www.tourism.gov.on.ca and click on the link entitled Travel Activities and Motivation Survey. The two reports are entitled "Aging the Canadian Market" and "Aging the US market".

TAMS Sample for Selected US States and Cities		
	Total Sample	Sample of those who go to live theatre, opera or ballet frequently or occasionally
New York State	2,197	1,148
New York City	751	425
Rochester	568	293
Buffalo	603	307
Michigan	951	490
Detroit	763	406
Ohio	2,483	1,176
Cleveland	566	307
Pennsylvania	1,503	726
Pittsburgh	572	263
Philadelphia	752	394
Illinois	910	478
Chicago	768	413
Washington DC	571	298
Massachusetts	782	429
Boston	567	321

EXECUTIVE SUMMARY

- A total of 27,510,471 adult residents of the combined states of New York, Washington DC, Massachusetts, Michigan, Ohio and Illinois indicated that when they are at home they go to live theatre, or opera or ballet on a frequent or occasional basis. That's a bit over 48% of the combined adult population of these states.

- For the states and cities examined in this report, irrespective of their place of residence, almost everyone in the Theatre/Opera/Ballet (TOB) group goes to the theatre frequently or occasionally when not travelling - between 96% and 98% do so. As such, compared to the other two activities, live theatre is the most popular cultural performance for this group.

- Ballet is the second most popular performance for the members of this group with the exception of those from Detroit and Illinois where ballet and opera are equally liked.

- Approximately one third of the members of the Theatre/Opera/Ballet (TOB) group go to live theatre frequently, with New York having the highest incidence of frequent theatre-goers (37%) and Buffalo, Washington DC and Illinois the lowest (25%).

- TOBs from New York City also have the highest incidence of going to the opera on a frequent basis (9%), but it is the TOBs from Boston, Pittsburgh and Washington DC that have the highest incidence of going to the ballet on a frequent basis (although their incidence is not significantly higher than that of the TOBs from New York City).

- Going to restaurants (other than fast food restaurants) and exercising either at home or in a fitness club are at the top of the TOBs' complementary activities they engage in on a frequent basis while not on a trip, followed by swimming in swimming pools or natural bodies of water, except for Buffalo, Cleveland, Pittsburgh, Massachusetts and Boston, where gardening is more important than swimming.

- Their own state of residence is the top destination chosen by TOBs for overnight leisure trips, with the exception of Rochester's TOBs who prefer Ontario. "Other US states"[2] is the second most preferred destination for TOBs

[2] "Other US states" means other than "own state", California, Hawaii, Texas, Las Vegas, Florida and New York.

with the exception of the TOBs from Buffalo, Detroit and Cleveland who also favour Ontario.

- Although TOBs travel outside the US more than other Americans, they do not appear to favour leaving their country in order to satisfy their needs for leisure travel. Ontario is the only exception to this observation.

- Irrespective of their place of residence, the number one travel experience for TOBs is to "Rest, Relax and Recuperate". Spending quality time with the immediate family away from home or visiting friends and relatives who live in other cities or countries share the second and third place on the TOBs' preference list with the exception of the TOBs from Massachusetts and Boston who prefer to "see natural wonders and important natural sites" and "historic sites and important places in history".

- TOBs are more active travellers in the area of culture and entertainment than other US residents. Overall, US residents participated in 13 of the cultural/entertainment activities listed in the Appendix, while on overnight trips while the TOBs' participation varied from a low of 13 activities for the TOBs of Pittsburgh to a high of 17 activities for the TOBs of Cleveland.

- The data in this report show that irrespective of the place of residence, when the TOBs travel they like to go to the restaurants, to read, to go to the movies and to shop especially for cloths, shoes, jewellery, arts & crafts, books and music. Participation in live theatre at the place visited varies from a low of 39% for the TOBs from Massachusetts to a high of 58% for Cleveland's TOBs, while participation in opera or ballet does not make it to the top 20 list of any TOB. This may be partly because most opera or ballet performances are closed during the summer season when most people travel.

- Irrespective of the place of residence, with the exception of Boston, Ontario received the highest marks from all TOBs for its natural beauty. It also received high marks as a place to rest, relax and recuperate with the exception of the TOBs from Michigan, Detroit, Massachusetts and Boston. Given that "rest, relax and recuperate" is the number one experience that TOBs seek when they travel, Ontario's low score in this area among some TOBs raises concerns.

- Given that TOBs do like to participate in cultural activities, it is also of concern the fact that Ontario received low marks from all TOBs, with the exception of those from Rochester and Buffalo, as a cultural destination.

- Respondents to the survey were presented with a list of 16 products and services and were asked to indicate which products would make them a lot more interested in visiting Ontario. The two products that received relatively high marks consistently across all TOBs (perhaps with the exception of Boston and Massachusetts regarding Great Lake cruises) were Great Lake cruises of one or more nights and overnight train tours through natural terrain. In addition TOBs from Buffalo indicated that a movie theme park such as Universal Studios or MGM, a cultural festival such as Mardi Gras and a science theme park such as Epcot would also make them a lot more interested in visiting the province.

- TOBs are avid readers of newspapers, both weekend and weekday editions. They also read community newspapers and the travel section of weekend and daily newspapers. News magazines, such as Time or Newsweek, are also read on a frequent basis by over half of the TOBs irrespective of their place of residence.

- "Movies on TV" are watched regularly by over 70% of TOBs irrespective of their place of residence. Other evening shows, such as evening drama, evening sitcoms and evening news shows are also watched by a majority of TOBs and so are nature shows and professional sports events.

- Between one third and two thirds of TOBs belong to the AAA, with TOBs from Illinois having the lowest incidence (30%) and TOBs from Massachusetts, Buffalo and Boston having the highest (61%). Approximately one quarter to one third of TOBs also belong to a sports club such as a tennis club, a golf club or a fitness centre with Boston having the highest incidence (34%) and Buffalo having the lowest (23%). As such AAA or sports clubs may be represent cost-efficient alternatives to TV for reaching TOBs.

- TOBs have a significantly higher level of education than other US residents - between 36% to 56% of TOBs have completed university (all levels) as opposed to 31% for the total US population. In addition the incidence of TOBs who have not completed high school is half that of the US as a whole. TOBs from Washington DC are the most educated followed by those from Boston, while the TOBs from Ohio and Michigan are the least educated.

- TOBs are also richer than other US residents, perhaps a consequence of their higher education. On a pro-rated basis, 51% of the TOBs have a household income of $60,000 and over, while only 31% of the US residents as a whole have a household income that falls in that range.

- Most TOBs are older than other US residents. The average age of TOBs varies from a low of 43.5 years for those from Washington DC to a high of 49.2 years for those from Pittsburgh, while the average age of the adult US population is 45.2 years.

- The size of TOB households varies considerably with their place of residence. The TOBs of New York City and Washington DC have the highest proportion of single households and the lowest proportion of households with four or more members. The TOBs of Buffalo, Pittsburgh and Ohio have the lowest proportion of single households and the highest proportion of two-member households.

- When compared to other TOBs, or to the US population as a whole, Ohio, Buffalo and Pittsburgh also have the highest proportion of couples and the lowest proportion of singles, while Washington DC, Pittsburgh, New York City, Pennsylvania and Illinois have the lowest proportion of households with children less than 13 years of age (appro ximately 20%).

- By the year 2025, the US is forecast to have 27% more residents aged 18 years or older than it did at the end of 1999 and 31% more TOBs. As such, TOBs will increase in importance as far as the whole US is concerned. On the other hand, the TOBs from the selected states and cities of this report are expected to experience growths ranging form -0.1%, for the TOBs of Pennsylvania, to 25.1% for the TOBs of Washington DC, while the total population of these regions is expected to experience growth rates between -1.4% for Pennsylvania, Philadelphia and Pittsburgh to 25.8% for Washington DC.

- As such, with the exception of New York City, Rochester and Washington DC, TOBs will increase in significance within the markets of the states/cities shown in this report. However, given that most of these states or cities are experiencing either no growth or a declining adult population, their respective TOB populations will not increase as much as in other parts of the US.

- By 2025, the TOBs of Pennsylvania, Pittsburgh and Philadelphia are expected to become considerably less active when they are not travelling. Most of the activities that the TOBs do on a frequent basis when not travelling decline with the exception of live theatre and ballet. For the other TOBs, those from Washington DC, Illinois and Chicago will become considerably more active in every activity, with the exception of cross-country skiing for the TOBs from Washington DC.

- The reason why the TOBs of some states, such as Washington DC, are expected to become more active and the TOBs of other states or cities less active is that the average age of the TOBs from New York City, Washington DC and Boston is actually expected to decline in 2025, while the average age of the TOBs of any other state or city cited in this report is expected to increase with Pittsburgh, Ohio and Philadelphia experiencing the largest increases.

- In 2025, Ontario will still be in the top ten preferred destination-lists of all TOBs with the exception of those from Massachusetts, Boston and Illinois. However, for Ontario all of these markets are expected to be either stagnant or declining over the period under consideration. Another destination that is expected to experience either no growth or a negative growth is the TOBs own state of residence.

- The destinations that are expected to experience significant growth are those that offer "warmth", such as Florida, California and Mexico or the Caribbean - an observation that is consistent with the aging of the TOBs. As such, if Ontario is to reverse this trend it may need to enter into innovative product development that provides the TOBs with the cultural experience that they seek while at the same time providing them with the convenience, piece of mind and warmth that they will also be seeking. Perhaps the cultural tourism industry could borrow from the gaming industry and develop art performance centres similar to "casino-hotels" or Las Vegas - but in this case it will be "opera-hotels" and art performance destination complexes.

- Another approach to dealing with these stagnant markets that does not involve new product development might be the extension of the season of the performing arts, especially opera, ballet and classical concerts, to cover the summer. This will provide TOB travellers with an opportunity not readily available in other destinations and as such provide Ontario with a competitive advantage in this area.

- For the US travellers as a whole, participation in all of the outdoor activities listed in the Appendix, with the exception of windsurfing, hand gliding, soccer and scuba diving, will increase in 2025 by an average of 18%. Similarly, participation in all of the cultural and entertainment activities listed in the Appendix will increase by an average of 26%.

- In contrast, for the TOB travellers from Buffalo, Rochester, Pittsburgh and Cleveland, participation in all of the outdoor, cultural and entertainment activities listed in the Appendix will decline by an average of -61%, -62%, -38% and -46%, respectively, for the outdoor activities and by -74%, -68%, -47% and

-51%, respectively, for the cultural/entertainment activities. The picture is very similar for the TOB travellers from Michigan, Detroit, Ohio, Pennsylvania and Philadelphia, but with fewer activities declining.

- Only the TOB travellers from Washington DC, Boston, Illinois and Chicago will see their participation in all of the outdoor, cultural and entertainment activities listed in the Appendix increase in 2025, with the exception of motorcycling as an overnight touring trip for the TOBs of Washington DC (it declines by 19%).

PART 1: THE PRESENT

How big is this market? A total of 27,510,471 residents of the combined states aged 18 years and over indicated that when they are at home they go to live theatre, or opera or ballet on a frequent or occasional basis. That's a bit over 48% of the combined adult population of these states.

The table below shows the incidence of participation in these three activities. Massachusetts had the highest incidence of participation among the states, followed by Washington DC, Illinois and New York, while Pennsylvania had the lowest. Not surprisingly, given the abundance of opportunities to participate in these activities the residents of New York City had the highest incidence of participation on a frequent or occasional basis when not travelling.

TABLE 1: Incidence of Participation

	Number of adults going to theatre, opera or ballet on a frequent or occasional basis when not travelling	Percent of total adult population
New York State	**6,849,616**	**50.1%**
Rochester	408,734	51.0%
Buffalo	434,130	49.8%
New York City	3,750,376	57.1%
Michigan	**3,368,676**	**46.4%**
Detroit	1,754,527	52.6%
Ohio	**3,909,850**	**45.1%**
Cleveland	911,921	54.5%
Pennsylvania	**4,401,587**	**43.8%**
Pittsburgh	833,930	45.7%
Philadelphia	1,919,204	51.9%
Washington DC	**1,808,628**	**51.7%**
Massachusetts	**2,702,411**	**55.3%**
Boston	2,323,248	56.5%
Illinois	**4,469,703**	**50.5%**
Chicago	3,092,929	53.8%

Irrespective of the state or city of residence, almost everyone in the Theatre/Opera/Ballet (TOB) group goes to the theatre on a frequent or occasional basis - between 96% and 98% do so. As such, compared to the other two activities, live theatre is the most popular cultural performance for this group.

Ballet is the second most popular performance of TOBs, with the exception of those from Detroit and Illinois where ballet and opera are equally liked.

Approximately one third of the members of the Theatre/Opera/Ballet (TOB) group go to live theatre frequently, with New York having the highest incidence of frequent theatre-goers (37%) and Buffalo, DC and Illinois the lowest (25%).

TABLE 2: Percent of Theatre/Opera/Ballet Goers who Go to Theatre, Opera or Ballet Frequently or Occasionally

	Live theatre			Opera			Ballet		
	Frequent	Occas.	Frequent or Occas.	Frequent	Occas.	Frequent or Occas.	Frequent	Occas.	Frequent or Occas.
New York	**31%**	**67%**	**98%**	**7%**	**21%**	**28%**	**7%**	**26%**	**33%**
Rochester	32%	64%	96%	3%	18%	21%	4%	20%	25%
Buffalo	25%	72%	97%	2%	15%	16%	3%	18%	21%
NY City	37%	61%	98%	9%	22%	31%	8%	26%	34%
Michigan	**31%**	**67%**	**98%**	**6%**	**17%**	**23%**	**7%**	**17%**	**24%**
Detroit	30%	68%	97%	4%	20%	24%	5%	19%	24%
Ohio	**28%**	**70%**	**97%**	**4%**	**19%**	**23%**	**6%**	**26%**	**31%**
Cleveland	30%	66%	97%	7%	20%	26%	7%	28%	35%
Pennsylvania	**26%**	**71%**	**97%**	**5%**	**15%**	**20%**	**6%**	**23%**	**29%**
Pittsburgh	30%	67%	96%	6%	22%	28%	9%	31%	39%
Philadelphia	27%	70%	97%	6%	17%	24%	8%	24%	32%
Washington DC	**25%**	**71%**	**97%**	**7%**	**18%**	**24%**	**9%**	**21%**	**30%**
Massachusetts	**27%**	**69%**	**96%**	**5%**	**18%**	**23%**	**8%**	**27%**	**36%**
Boston	28%	69%	96%	5%	18%	23%	9%	27%	36%
Illinois	**25%**	**71%**	**96%**	**4%**	**15%**	**19%**	**4%**	**15%**	**19%**
Chicago	26%	70%	96%	4%	18%	21%	4%	19%	23%

TOBs from New York City also have the highest incidence of frequent opera-goers (9%), but it is Boston, Pittsburgh and Washington DC that have the highest incidence of frequent ballet goers, although their incidence is not significantly higher than that of the TOBs from New York City.

Pittsburgh has the largest overlap between people who go to all three cultural performances (its TOBs attending on average 1.64 of the three performances), followed by New York state (average of 1.58 performances). Illinois, perhaps due to its large rural area has the lowest overlap with its TOBs attending on average 1.34 of the three performances.

Table 3 shows other activities that members of the TOB group engage in on a frequent basis while not travelling. For comparison purposes, the first column of the table shows the proportion of all US residents who participate in the activities shown in the table on a frequent basis while not travelling.

TABLE 3: Other Activities that TOBs do on a Frequent Basis when Not Travelling

	Total USA	New York	Roch-ester	Buffalo	NY City	Michi-gan	Detroit	Ohio	Clevel-and
Dine in restaurants other than fast food	51%	64%	60%	58%	65%	66%	69%	68%	66%
Exercise at home or at fitness club	44%	49%	54%	51%	53%	54%	54%	48%	51%
Swim in pools or natural water bodies	31%	36%	41%	40%	30%	41%	40%	40%	34%
Gardening	30%	29%	37%	41%	23%	39%	36%	35%	38%
Go to a park for a picnic or day outing	20%	25%	29%	27%	27%	27%	29%	27%	26%
Camp/hike/backpack	17%	12%	21%	15%	8%	19%	19%	22%	13%
Dancing	17%	22%	15%	17%	26%	23%	23%	19%	23%
Go to music concerts - jazz, classical, rock	16%	24%	24%	22%	26%	26%	26%	25%	28%
Biking	15%	21%	21%	23%	20%	22%	23%	17%	19%
Fishing	15%	9%	8%	10%	7%	16%	11%	15%	12%
Play team sports	12%	11%	10%	10%	12%	13%	13%	12%	16%
Go to professional sports events	12%	16%	15%	19%	14%	19%	19%	19%	21%
Go to a museum	12%	25%	23%	13%	31%	16%	18%	16%	19%
Golf	11%	10%	16%	13%	4%	17%	18%	16%	19%
Visit amusement or theme parks	11%	13%	13%	13%	15%	13%	17%	15%	18%
Sailing/other boating	10%	9%	16%	11%	7%	15%	14%	12%	12%
Go to a zoo or botanical garden	10%	18%	15%	12%	21%	15%	16%	18%	16%
Go to an art gallery or art show	9%	20%	19%	14%	23%	13%	13%	12%	16%
Gamble at casinos	7%	8%	5%	8%	8%	9%	8%	10%	11%
Hunting	7%	3%	5%	4%	2%	10%	7%	6%	3%
Play racquet sports	6%	9%	9%	6%	9%	9%	9%	6%	7%
Downhill ski/snowboard	5%	8%	9%	9%	6%	6%	7%	5%	6%
Canoe/kayak	4%	6%	8%	2%	2%	11%	6%	5%	3%
Ice-skating	3%	6%	5%	7%	6%	5%	6%	4%	4%
Cross-country skiing	2%	5%	5%	4%	2%	4%	2%	1%	2%
Snowmobiling	2%	4%	4%	4%	2%	5%	5%	1%	1%

Going to restaurants (other than fast food restaurants) and exercising either at home or in a fitness club are at the top of the TOBs' complementary activities they engage in on a frequent basis, followed by swimming in swimming pools or natural bodies of water, except for Buffalo, Cleveland, Pittsburgh, Massachusetts and Boston where gardening is more important than swimming.

TABLE 3: Other Activities that TOBs do on a Frequent Basis when Not Travelling - Contd

	Total USA	Pennsy-lvania	Pitts-burgh	Phila-delphia	Washin-gton DC	Massa-chusetts	Boston	Illinois	Chicago
Dine in restaurants other than fast food	51%	62%	69%	64%	66%	61%	61%	61%	64%
Exercise at home or at fitness club	44%	51%	44%	60%	58%	52%	50%	49%	51%
Swim in pools or natural water bodies	31%	39%	38%	37%	34%	37%	36%	29%	32%
Gardening	30%	35%	45%	29%	29%	38%	37%	29%	29%
Go to a park for a picnic or day outing	20%	19%	26%	21%	27%	19%	18%	20%	21%
Camp/hike/backpack	17%	15%	16%	12%	16%	18%	17%	14%	13%
Dancing	17%	23%	19%	27%	26%	22%	22%	17%	21%
Go to music concerts - jazz, classical, rock	16%	20%	25%	21%	24%	27%	27%	23%	23%
Fishing	15%	14%	12%	10%	9%	9%	8%	12%	10%
Biking	15%	13%	14%	19%	19%	23%	23%	24%	28%
Play team sports	12%	14%	10%	14%	14%	10%	10%	13%	10%
Go to professional sports events	12%	16%	21%	20%	14%	13%	13%	13%	14%
Go to a museum	12%	16%	20%	20%	31%	26%	27%	20%	22%
Golf	11%	14%	14%	15%	10%	13%	12%	18%	18%
Visit amusement or theme parks	11%	15%	20%	14%	16%	11%	10%	12%	14%
Sailing/other boating	10%	8%	7%	7%	8%	13%	13%	11%	11%
Go to a zoo or botanical garden	10%	13%	16%	14%	17%	11%	11%	17%	22%
Go to art gallery or show	9%	13%	13%	16%	25%	22%	23%	13%	15%
Hunting	7%	8%	4%	2%	5%	2%	2%	4%	2%
Gamble at casinos	7%	10%	8%	8%	5%	5%	5%	7%	8%
Play racquet sports	6%	7%	7%	10%	13%	9%	9%	10%	11%
Downhill ski/snowboard	5%	5%	6%	6%	6%	12%	12%	5%	5%
Canoe/kayak	4%	5%	4%	4%	4%	9%	8%	4%	4%
Ice-skating	3%	7%	6%	7%	3%	8%	8%	4%	5%
Cross-country skiing	2%	2%	2%	1%	1%	5%	5%	2%	3%
Snowmobiling	2%	3%	1%	2%	0%	1%	1%	2%	2%

TABLE 4: Top 5 Destinations Visited by TOBs for Overnight Pleasure Trips Percent of TOBs who have Visited the Destination									
	Destination								
Place of Residence	Own state	Other US states	Florida	Las Vegas	New York State	Ontario	U.K./ Europe	Other Overseas Country	Quebec
Total US	59%	42%	19%	13%	12%				
New York	54%	40%	28%			24%	19%		
Rochester	59%	50%	28%			69%			14%
Buffalo	63%	48%	31%			61%	15%		
NY City	50%	33%	26%				26%	20%	
Michigan	69%	49%	33%	18%		46%			
Detroit	72%	51%	39%	19%		55%			
Ohio	53%	45%	22%		18%	27%			
Cleveland	54%	44%	24%		26%	46%			
Pennsylvania	48%	40%	22%		27%	19%			
Pittsburgh	59%	49%	31%		30%	38%			
Philadelphia	47%	37%	24%		29%		19%		
Washington DC	48%	40%	24%		20%		25%		
Massachusetts	50%	40%	25%		31%		31%		
Boston	49%	39%	24%		31%		32%		
Illinois	53%	48%	24%	17%			17%		
Chicago	48%	42%	25%	19%			19%		

Although the US overall does not have a very high incidence of frequent museum goers (12%), TOBs have a significantly higher incidence of going to the museum on a frequent basis while not travelling, with the TOBs from New York City and Washington DC having the highest (31%). In general, TOBs have a higher incidence of participation in cultural activities than the general population of the US.

As was the case for all US residents, their own state is the top destination chosen by TOBs for overnight leisure trips, with the exception of Rochester's TOBs who prefer Ontario. "Other US states"[3] is the second most preferred destination for TOBs with the exception of the TOBs from Buffalo, Detroit and Cleveland who also favour Ontario.

Although they have higher incidences of travel outside the US, TOBs do not appear to favour leaving their country in order to satisfy their needs for leisure travel.

[3] "Other US states" means other than "own state", California, Hawaii Texas, Las Vegas, Florida and New York.

Ontario is the only exception to this observation. Boston and the rest of Massachusetts have the highest incidence of visiting UK/Europe and New York City for visiting Mexico/Caribbean (16%).

Travel Experiences sought: Irrespective of their place of residence, TOBs' number one travel experience is to "Rest, Relax and Recuperate". Spending quality time with the immediate family away from home or visiting friends and relatives who live in other cities or countries share the second and third place on the TOBs' preference list with the exception of the TOBs from Massachusetts and Boston.

For the TOBs from Massachusetts to "see natural wonders and important natural sites" and to "see historic sites and important places in history" are second and third, respectively, most important travel experiences, while for Boston's TOBs to "see historic sites" is the second most important travel experience and to see natural sites third.

Travelling for intimacy and romance is an important experience sought by 31% to 46% of the TOBs, with those residing in Chicago, Cleveland, New York City, Philadelphia, Pennsylvania, Illinois and Ohio being at the top of the range.

To experience different cultures is an important experience sought by all TOBs with the exception of those from New York state as a whole, Rochester and Buffalo.
As mentioned earlier, visiting historic sites and important places in history is an important travel experience for all TOBs (with an incidence ranging between 46% and 69%), especially for those from Boston, and spending time with a group of good friends is an important experience for all TOBs, especially the ones from Buffalo (with an incidence ranging from 44% to 60%).

Familiarity with the destination and feeling safe seem to be more important for the TOBs of New York City than any other TOB, while experiencing the good life (fine food, good wine, being pampered) appears to be more important for the TOBs of Pennsylvania and Pittsburgh than other TOBs.

Visiting casinos in order to gamble appears to be important only for the TOBs from Buffalo, Cleveland and Detroit, while the "trendiness" or popularity of the destination appears to be moderately important only for the TOBs of Philadelphia.

Finding excitement and adventure is an important experience for all TOBs (with an incidence ranging between 30% and 49%), especially those from New York City, Chicago and Illinois as a whole.

TABLE 5: Travel Experiences Sought								
	New York	Roche-ster	Buffalo	NY City	Michigan	Detroit	Ohio	Clevel-and
Rest, relax, recuperate	82%	80%	79%	79%	74%	74%	81%	86%
Quality time with family away from home	65%	73%	61%	56%	65%	62%	72%	65%
Visit friends/relatives	76%	70%	67%	85%	78%	76%	78%	86%
Intimacy and romance	39%	31%	37%	43%	33%	35%	41%	46%
Experience different cultures	33%	25%	28%	50%	38%	41%	37%	41%
Visit historical sites/places	54%	53%	46%	55%	48%	50%	52%	57%
Time with group of good friends	55%	46%	60%	54%	46%	49%	46%	52%
See natural wonders/sites	51%	54%	54%	38%	47%	47%	53%	54%
Experience the good life	35%	30%	32%	36%	34%	39%	34%	39%
Visit casinos and gamble	29%	27%	39%	21%	33%	34%	28%	37%
Visit popular, trendy place	19%	16%	19%	21%	24%	24%	24%	22%
Be at familiar and safe place	36%	30%	32%	41%	36%	35%	29%	32%
Adventure/excitement	42%	34%	30%	48%	37%	40%	42%	45%
City life nightlife/shop/museum	40%	38%	48%	39%	45%	48%	44%	43%
Escape winter weather	34%	39%	35%	16%	36%	41%	28%	31%
Experience unspoiled nature	36%	38%	35%	38%	34%	35%	36%	32%
Participate in hobby/sport	30%	37%	30%	25%	34%	40%	30%	20%
Hands-on learning experience	8%	8%	6%	10%	6%	5%	7%	8%

Experiencing city life (shopping, going to museums, experiencing the nightlife) is an important experience for all TOBs, except for those from Pittsburgh.

Escaping the winter weather is important for the TOBs from Detroit, Illinois and Chicago and not an issue for the TOBs from New York City (16%), primarily because the weather in the former places is worse than New York City's.

A bit over a third of the TOBs from New York, Michigan, Ohio and their cities travel to experience unspoiled nature, but between 40% and 58% of the remaining TOBs seek this experience when travelling.

Participation in a hobby or sport is important to about one third of the TOBs and to about half of the TOBs from Illinois and Chicago. Finally, between 5 and 11% of the TOBs travel in order to participate in a hands-on learning experience, with Massachusetts having the highest incidence of participation and Detroit the lowest.

TABLE 5: Travel Experiences Sought - Contd								
	Pennsy-lvania	Pitts-burgh	Philadel-phia	DC	Massa-chusetts	Boston	Illinois	Chicago
Rest, relax, recuperate	84%	73%	94%	80%	77%	82%	86%	90%
Quality time with family away from home	69%	72%	68%	66%	58%	61%	67%	69%
Visit friends/relatives	70%	68%	71%	77%	63%	60%	81%	81%
Intimacy and romance	40%	37%	43%	36%	33%	34%	43%	46%
Experience different cultures	45%	41%	50%	49%	53%	50%	51%	54%
Visit historical sites/places	52%	48%	51%	66%	64%	69%	59%	63%
Time with group of good friends	54%	50%	58%	45%	49%	44%	56%	55%
See natural wonders/sites	54%	55%	50%	57%	66%	65%	57%	61%
Experience the good life	49%	47%	53%	35%	31%	31%	36%	37%
Visit casinos and gamble	30%	33%	29%	27%	15%	13%	29%	30%
Visit popular, trendy place	23%	20%	27%	20%	10%	5%	18%	17%
Be at familiar and safe place	26%	21%	29%	33%	24%	24%	40%	40%
Adventure/excitement	40%	36%	43%	45%	43%	43%	47%	49%
City life nightlife/shop/museum	37%	28%	43%	40%	42%	41%	45%	46%
Escape winter weather	24%	30%	22%	19%	37%	37%	42%	44%
Experience unspoiled nature	40%	40%	37%	43%	55%	58%	46%	48%
Participate in hobby/sport	33%	37%	31%	32%	35%	35%	47%	49%
Hands-on learning experience	6%	7%	6%	15%	11%	9%	10%	10%

Cultural/entertainment activities participated in while on an overnight trip: TOBs are more active travellers in the area of culture and entertainment than other US residents. Overall, US residents participated in 13 of the cultural/entertainment activities listed in the Appendix, while on overnight trips while the TOBs' participation varied from a low of 13 activities for the TOBs of Pittsburgh to a high of 17 activities for the TOBs of Cleveland.

The data in Table 6 show that irrespective of the place of residence, TOBs like to go to the restaurants, to read, to go to the movies and to shop especially for clothes, shoes, jeweller y, arts & crafts and books or music.

Participation in live theatre at the place visited varies from a low of 39% for the TOBs from Massachusetts to a high of 58% for Cleveland's TOBs, while participation in opera or ballet does not make it to the top 20 list of any TOB.

TABLE 6: Top 20 Cultural & Entertainment Activities TOBs Participate in while on Overnight Trips					
	Total US	New York	Rochester	Buffalo	N.Y. City
Restaurant dining - regional or local cuisine	77%	75%	84%	75%	74%
Read for relaxation on trip	59%	64%	72%	65%	59%
Shop/browse -clothing/shoes/jewellery	61%	63%	67%	75%	56%
Movies	50%	54%	55%	57%	57%
Shop/browse - local arts & crafts	50%	53%	65%	58%	46%
Shop/browse - book or music stores	53%	53%	59%	51%	54%
Visit natural wonders such as Niagara Falls	33%	49%	63%	69%	31%
Theatre	29%	48%	54%	52%	44%
Zoos	45%	44%	46%	45%	45%
Shop/browse - antiques	41%	42%	48%	43%	43%
Aquariums	35%	41%	-	44%	40%
General history museums	36%	40%	35%	35%	44%
Local outdoor cafes	37%	40%	39%	36%	46%
Amusement parks like Disneyland	35%	40%	40%	38%	30%
Art galleries	33%	37%	34%	35%	48%
Local festivals or fairs	36%	36%	40%	45%	-
Casinos	33%	36%	34%	41%	35%
Historic sites	27%	35%		-	42%
Shop/browse - retail gourmet foods	27%	32%	36%	35%	32%
Restaurant dining - internationally acclaimed	26%	30%	-	-	41%
Science/technology museums	22%	-	32%	-	-
Prof'l baseball - spectator	24%	-	32%	-	-
Prof'l football - spectator	16%			36%	-
Movie theme parks	26%	-	-	32%	
Botanical gardens	25%	-	-	-	39%

There are two hypotheses that could be advanced regarding travellers behaviour. The first hypothesis would suggest that people's activities at home help shape their preference set which then dictates what they will do or seek to do irrespective of the place they just happen to be at a particular point in time. For example, Washington DC TOBs who are exposed to museums may have developed a "museum taste" that they seek to satisfy irrespective of the place they are in. Table 6 shows that the Washington DC's TOBs have indeed the highest participation in museums while on overnight trips (54%) than any other TOB.

TABLE 6: Top 20 Cultural & Entertainment Activities TOBs Participate in while on Overnight Trips - Contd					
	Michigan	Detroit	Ohio	Cleveland	Washington DC
Restaurant dining - regional or local cuisine	73%	70%	83%	93%	85%
Read for relaxation on trip	65%	63%	67%	77%	70%
Shop/browse -clothing/shoes/jewellery	57%	59%	63%	66%	58%
Shop/browse - local arts & crafts	52%	51%	58%	75%	60%
Zoos	50%	49%	49%	52%	39%
Shop/browse - book or music stores	48%	49%	62%	73%	67%
Shop/browse - antiques	48%	45%	41%	54%	47%
Movies	47%	47%	48%	54%	58%
Theatre	44%	40%	46%	58%	46%
Local outdoor cafes	41%	41%	43%	55%	52%
Aquariums	40%	41%	31%	-	41%
General history museums	38%	37%	39%	45%	54%
Casinos	38%	38%	-	40%	-
Art galleries	37%	39%	37%	42%	57%
Farmers' fairs and markets	37%	40%	33%	-	-
Visit natural wonders such as Niagara Falls	36%	35%	37%	48%	31%
Local festivals or fairs	34%	36%	41%	48%	32%
Shop/browse - retail gourmet foods	34%	33%	37%	46%	37%
Science/technology museums	33%	36%	-	38%	49%
Amusement parks like Disneyland	32%	35%	36%	43%	-
Historic sites	-	-	-	-	37%
Restaurant dining - internationally acclaimed	-	-	34%	45%	32%
Prof'l baseball - spectator	-	-	33%	44%	-
Historical replicas of cities with re-enactments					38%

The other hypothesis would suggest that the things that people want to participate in while on a trip are the things that they don't do at home either because there is insufficient supply or because they do not have the time to engage in them. The fact that almost all TOBs attend live theatre when at home but only 39% to 58% do so when they are travelling seems to indicate that they either choose destinations where the theatre experience is not offered or that they choose destinations where live theatre is o ffered, but 42% to 61% choose not to attend.

TABLE 6: Top 20 Cultural & Entertainment Activities TOBs Participate in while on Overnight Trips - Contd					
	Pennsyl-vania	Pitts-burgh	Philadel-phia	Massa-chusetts	Boston
Restaurant dining - regional or local cuisine	83%	78%	87%	88%	84%
Shop/browse -clothing/shoes/jewellery	64%	70%	66%	68%	72%
Read for relaxation on trip	64%	54%	75%	73%	71%
Shop/browse - local arts & crafts	58%	65%	53%	66%	68%
Shop/browse - book or music stores	58%	56%	63%	60%	57%
Movies	56%	50%	64%	50%	51%
Theatre	49%	55%	50%	39%	46%
Shop/browse - antiques	45%	-	52%	46%	51%
Local outdoor cafes	44%	46%	45%	51%	52%
Zoos	38%	41%	41%	36%	41%
Local festivals or fairs	38%	36%	39%	38%	31%
Casinos	37%	37%	40%	29%	-
Shop/browse - retail gourmet foods	37%	37%	40%	31%	32%
General history museums	35%	34%	36%	43%	45%
Visit natural wonders such as Niagara Falls	35%	44%	-	43%	44%
Restaurant dining - internationally acclaimed	34%	-	43%	-	34%
Farmers' fairs and markets	34%	29%	37%	34%	-
Art galleries	33%	-	40%	53%	46%
Aquariums	32%	27%	40%	37%	42%
Historic sites	32%	24%	37%	38%	41%
Science/technology museums	-	-	34%	-	
Amusement parks like Disneyland	-	34%	-	-	-
Prof'l football - spectator	-	25%	-	-	-
Historical replicas of cities with re-enactments					28%
Movie theme parks	-	30%	-	-	
Botanical gardens	-	-	-	29%	30%

The data in Table 6 seem to indicate that both hypotheses may be correct. That is, some people may seek to do the activities that form part of their preference set, while others seek to do the things that they cannot do at home.

TABLE 6: Top 20 Cultural & Entertainment Activities TOBs Participate in while on Overnight Trips – Contd		
	Illinois	Chicago
Restaurant dining – regional or local cuisine	85%	83%
Read for relaxation on trip	71%	69%
Shop/browse -clothing/shoes/jewellery	64%	61%
Movies	61%	65%
Shop/browse – local arts & crafts	57%	59%
Shop/browse – book or music stores	54%	57%
Shop/browse – antiques	52%	56%
Local outdoor cafes	50%	51%
Zoos	49%	54%
Theatre	47%	45%
Farmers' fairs and markets	45%	44%
Local festivals or fairs	43%	43%
Art galleries	42%	43%
General history museums	41%	43%
Amusement parks like Disneyland	39%	42%
Visit natural wonders such as Niagara Falls	38%	41%
Historic sites	36%	40%
Casinos	35%	-
Aquariums	35%	38%
Botanical gardens	33%	36%
Movie theme parks	-	35%

How do TOBs view Ontario? The survey asked respondents to indicate whether they agreed or disagreed with 25 statements about Ontario. A score of zero indicates complete disagreement while a score of 10 indicates complete agreement. Table 7 presents the proportion of TOB travellers who scored a 9 or a 10.

Overall, TOBs seem to rate Ontario higher than other US travellers, with the exception of the statement "A great place to experience aboriginal culture".

Irrespective of the place of residence, with the exception of Boston, Ontario received the highest marks from all TOBs for its natural beauty. It also received high marks as a place to rest, relax and recuperate with the exception of the TOBs from Michigan, Detroit, Massachusetts and Boston. Given that "rest, relax and

recuperate" is the number one experience that TOBs seek when they travel, Ontario's low score in this area among some TOBs raises concerns.

TABLE 7: Percent of TOB travellers who agreed almost completely with the following statements about Ontario (responded with a 9 or a 10 on a 10-point scale)

	Total USA	New York	Roche-ster	Buffalo	NY City	Michi-gan	Detroit	Ohio	Cleve-land
A place with beautiful scenery	48%	50%	59%	54%	44%	44%	45%	52%	64%
A great place to relax	35%	41%	55%	43%	32%	27%	29%	39%	41%
A great place to see important historical sites	24%	25%	32%	27%	17%	20%	23%	27%	32%
A great place to experience city life (night clubs, museums, shopping)	22%	36%	54%	37%	19%	29%	31%	35%	46%
A place with many cultural attractions	22%	34%	50%	40%	17%	24%	26%	30%	36%
A great place to experience aboriginal culture	15%	13%	9%	10%	20%	9%	9%	12%	10%
Very safe for visitors	26%	36%	48%	27%	35%	35%	38%	36%	44%
Lots of things for families to see and do	26%	33%	41%	43%	25%	23%	26%	37%	43%
Lots of things for young adults to see and do	20%	30%	38%	34%	23%	20%	23%	30%	37%
Lots of things for mature adults to see and do	28%	37%	49%	45%	25%	24%	27%	40%	47%
Very clean and cared for	33%	49%	56%	54%	47%	40%	44%	42%	47%
Very friendly people	27%	38%	42%	37%	35%	28%	30%	35%	43%
One of the best destinations in the summer	26%	36%	44%	41%	32%	28%	31%	33%	43%
One of the best destination in the winter	11%	18%	16%	21%	19%	10%	11%	11%	9%
Offers excellent value for money	17%	31%	39%	28%	27%	30%	33%	30%	44%
A popular, trendy place	12%	23%	31%	24%	15%	12%	12%	19%	31%
A great place to experience the good life (fine cuisine, good wine, being pampered)	15%	27%	36%	23%	25%	16%	16%	23%	36%
A place you go to for romance	17%	23%	31%	20%	19%	19%	22%	25%	36%
One of the best destinations for outdoor activities	26%	26%	30%	29%	23%	32%	33%	28%	32%
A great place to experience different cultures and ways of life	22%	24%	21%	23%	24%	25%	27%	26%	29%
A place that respects the natural environment	32%	38%	45%	36%	37%	33%	37%	35%	49%
A great place to go to for fishing	33%	24%	28%	21%	22%	25%	27%	38%	40%
A great place to go to for hunting	27%	17%	12%	19%	18%	20%	21%	28%	31%
A place with interesting shops	23%	31%	44%	39%	16%	24%	27%	36%	43%
A great place for adventure & excitement	26%	28%	30%	27%	26%	18%	21%	29%	40%

TABLE 7: Percent of TOB travellers who agreed almost completely with the following statements about Ontario (responded with a 9 or a 10 on a 10-point scale) – Contd								
	Pennsy-lvania	Pitts-burgh	Phila-delphia	Washin-gton DC	Massa-chusetts	Boston	Illinois	Chicago
A place with beautiful scenery	49%	56%	46%	48%	41%	34%	43%	48%
A great place to relax	41%	52%	38%	32%	24%	21%	31%	35%
A great place to see important historical sites	28%	31%	27%	22%	20%	17%	20%	23%
A great place to experience city life (night clubs, museums, shopping)	33%	41%	31%	23%	19%	17%	19%	22%
A place with many cultural attractions	24%	32%	22%	19%	18%	16%	22%	25%
A great place to experience aboriginal culture	14%	12%	14%	14%	14%	9%	9%	10%
Very safe for visitors	28%	34%	26%	25%	24%	24%	23%	24%
Lots of things for families to see and do	32%	33%	34%	22%	20%	19%	25%	25%
Lots of things for young adults to see and do	26%	20%	32%	15%	20%	19%	19%	18%
Lots of things for mature adults to see and do	34%	39%	34%	23%	23%	20%	25%	26%
Very clean and cared for	42%	53%	38%	33%	30%	30%	29%	30%
Very friendly people	33%	40%	33%	27%	28%	27%	27%	26%
One of the best destinations in the summer	29%	33%	28%	22%	20%	21%	31%	31%
One of the best destination in the winter	17%	13%	19%	16%	11%	9%	12%	14%
Offers excellent value for money	23%	30%	21%	23%	23%	24%	19%	21%
A popular, trendy place	14%	16%	13%	16%	9%	8%	13%	16%
A great place to experience the good life (fine cuisine, good wine, being pampered)	19%	22%	19%	12%	16%	13%	16%	18%
A place you go to for romance	18%	21%	17%	13%	11%	10%	17%	16%
One of the best destinations for outdoor activities	28%	25%	31%	30%	23%	22%	25%	28%
A great place to experience different cultures and ways of life	24%	23%	26%	19%	18%	16%	19%	20%
A place that respects the natural environment	37%	41%	36%	30%	21%	19%	33%	36%
A great place to go to for fishing	29%	32%	28%	28%	22%	21%	38%	41%
A great place to go to for hunting	24%	25%	25%	24%	19%	16%	31%	34%
A place with interesting shops	25%	29%	24%	23%	20%	16%	24%	26%
A great place for adventure & excitement	27%	29%	28%	23%	19%	16%	24%	27%

Given that TOBs do like to participate in cultural activities, it is also of concern the fact that Ontario received low marks from all TOBs, with the exception of those from Rochester and Buffalo, on the statements related to culture.

TABLE 8: Percent of TOB travellers who indicated that they would be a lot more interested in visiting Ontario if the products listed below were available

	New York	Rochester	Buffalo	NY City	Michigan	Detroit	Ohio	Cleveland
Child-oriented amusement park, e.g., Disneyland	20%	21%	25%	15%	16%	18%	16%	26%
Movie theme park, e.g., MGM	26%	27%	34%	15%	20%	24%	18%	26%
Musical attraction, e.g., Jazzland	11%	10%	13%	8%	10%	13%	6%	6%
Cultural festival e.g. Mardi Gras	28%	20%	30%	25%	15%	17%	14%	16%
Musical festival, e.g. Jazz Festival in Montreal	25%	18%	24%	24%	19%	20%	16%	25%
Film festival, e.g., Cannes Film Festival	17%	11%	17%	23%	12%	13%	8%	12%
Heritage attraction with re-enactments	23%	19%	22%	19%	22%	25%	21%	15%
Science/technology theme park, e.g. Epcot	32%	29%	37%	22%	31%	33%	25%	29%
Garden attraction, e.g. Tivoli	21%	24%	24%	20%	27%	26%	19%	14%
Aboriginal attraction, e.g., Indian Museum of N. America	19%	18%	19%	21%	19%	21%	18%	22%
Cruises on Great Lakes - overnight	37%	30%	44%	31%	26%	28%	37%	43%
Wine region, e.g. Napa valley	24%	7%	24%	24%	12%	14%	17%	24%
Forestry or mining attraction	8%	7%	12%	5%	14%	16%	9%	10%
Game park/wildlife viewing area	25%	28%	25%	24%	30%	31%	22%	21%
Overnight train tours through natural terrain	34%	33%	36%	36%	37%	41%	47%	52%
World class trophy fishing	7%	3%	9%	9%	6%	8%	5%	11%

The survey also asked respondents to indicate which of the products and services listed on Table 8 would make them a lot more interested in visiting Ontario. The two products that received relatively high marks consistently across all TOBs (perhaps with the exception of Boston and Massachusetts regarding Great Lake cruises) were Great Lake cruises of one or more nights and overnight train tours through natural terrain. In addition TOBs from Buffalo indicated that a movie theme park such as Universal Studios or MGM, a cultural festival such as Mardi Gras and a science theme park such as Epcot would also make them a lot more interested in visiting the province.

TABLE 8: Percent of TOB travellers who indicated that they would be a lot more interested in visiting Ontario if the products listed below were available - Contd								
	Pennsyl-vania	Pitts-burgh	Philadel-phia	Washin-gton DC	Massa-chusetts	Boston	Illinois	Chicago
Child-oriented amusement park, e.g., Disneyland	16%	16%	17%	13%	15%	13%	11%	13%
Movie theme park, e.g., MGM	19%	21%	20%	5%	14%	13%	16%	15%
Musical attraction, e.g., Jazzland	9%	9%	10%	6%	6%	4%	6%	7%
Cultural festival e.g. Mardi Gras	26%	20%	30%	11%	12%	11%	9%	11%
Musical festival, e.g. Jazz Festival in Montreal	19%	13%	25%	15%	10%	11%	16%	18%
Film festival, e.g., Cannes Film Festival	14%	15%	15%	8%	9%	8%	9%	11%
Heritage attraction with re-enactments	22%	30%	18%	22%	17%	12%	10%	12%
Science/technology theme park, e.g. Epcot	25%	25%	25%	22%	11%	9%	24%	27%
Garden attraction, e.g. Tivoli	19%	13%	20%	15%	14%	12%	11%	13%
Aboriginal attraction, e.g., Indian Museum of N. America	21%	23%	19%	25%	21%	18%	19%	22%
Cruises on Great Lakes - overnight	36%	34%	40%	27%	21%	22%	25%	29%
Wine region, e.g. Napa valley	22%	21%	25%	17%	21%	21%	21%	23%
Forestry or mining attraction	12%	10%	12%	17%	15%	14%	12%	13%
Game park/wildlife viewing area	29%	28%	30%	36%	28%	27%	25%	25%
Overnight train tours through natural terrain	34%	36%	33%	39%	38%	26%	39%	42%
World class trophy fishing	7%	7%	7%	5%	1%	1%	9%	8%

TABLE 9: Publications Read on a Regular Basis - TOBs						
	Daily newspaper	Daily newspaper-travel section	Weekend newspaper	Weekend newspaper - travel section	Community newspapers	Other newspapers
New York	81%	51%	81%	62%	65%	44%
Illinois	84%	47%	76%	56%	67%	41%
Pennsylvania	82%	50%	77%	58%	63%	38%
Ohio	81%	54%	83%	58%	69%	38%
NY City	80%	51%	76%	59%	56%	45%
Michigan	74%	45%	81%	60%	62%	35%
Chicago	81%	49%	80%	61%	69%	39%
Massachusetts	81%	50%	82%	64%	72%	42%
Boston	80%	48%	82%	64%	71%	41%
Philadelphia	82%	49%	84%	62%	65%	40%
Washington DC	79%	48%	82%	59%	65%	39%
Detroit	72%	47%	81%	60%	65%	35%
Cleveland	83%	58%	86%	65%	68%	33%
Pittsburgh	83%	52%	86%	64%	64%	35%
Buffalo	84%	51%	87%	65%	68%	40%
Rochester	81%	51%	84%	62%	66%	35%

How does one reach them? TOBs are avid readers of newspapers, both weekend and weekday editions. They also read community newspapers and the travel section of weekend and daily newspapers. News magazines such as Time or Newsweek are also red on a frequent basis by over half of the TOBs irrespective of their place of residence (Table 9).

Although not as many TOBs watch TV on a regular basis, "movies on TV" are watched regularly by over 70% of TOBs irrespective of their place of residence. Other evening shows, such as evening drama, evening sitcoms and evening news shows are also watched by a majority of TOBs and so are nature shows and professional sports events (Table 10).

TABLE 9: Publications Read on a Regular Basis - TOBs, Contd

	Travel[4] magazines	National Geographic	Sports[5] magazines	Hobby[6] magazines	News[7] magazines	Fashion[8] magazines	General[9] interest magazines	Other magazines
New York	37%	34%	28%	42%	53%	44%	36%	55%
Illinois	34%	33%	33%	36%	53%	35%	22%	56%
Pennsylvania	34%	31%	32%	42%	51%	45%	30%	59%
Ohio	34%	34%	35%	43%	54%	42%	25%	57%
NY City	37%	33%	30%	41%	56%	44%	46%	57%
Michigan	41%	36%	27%	40%	50%	39%	20%	56%
Chicago	36%	31%	33%	38%	56%	37%	26%	56%
Massachusetts	32%	34%	27%	38%	55%	42%	29%	54%
Boston	32%	34%	27%	37%	56%	43%	31%	55%
Philadelphia	34%	36%	34%	41%	54%	46%	34%	60%
Washington DC	34%	37%	30%	41%	50%	37%	30%	58%
Detroit	40%	32%	33%	42%	51%	42%	22%	59%
Cleveland	31%	28%	30%	34%	50%	40%	28%	51%
Pittsburgh	41%	34%	32%	43%	53%	43%	26%	62%
Buffalo	32%	39%	29%	40%	55%	42%	24%	52%
Rochester	30%	37%	31%	46%	51%	43%	18%	55%

Between one third and two thirds of TOBs belong to the AAA, with TOBs from Illinois having the lowest incidence (30%) and TOBs from Massachusetts, Buffalo and Boston having the highest (61%). Approximately one quarter to one third of TOBs also belong to a sports club such as a tennis club, a golf club or a fitness centre with Boston having the highest incidence (34%) and Buffalo having the

[4] Such as National Geographic Traveller, Travel & Leisure and Conde Nast
[5] Such as Sports Illustrated or specific sports magazines such as Golf Magazine, Sail Magazine
[6] Such as Food & Wine, Gourmet and Gardening
[7] Such as Time and Newsweek
[8] Such as Vogue and Women's Day
[9] Such as New Yorker and Harper's

lowest (23%). As such, AAA or sports clubs may be represent cost-efficient alternatives to TV for reaching TOBs.

TABLE 10: TV Shows Watched on a Regular Basis - TOBS						
	Morning news shows	Early evening news shows	Late evening news shows	News magazine shows	Daytime TV weekdays	Professional sports events
New York	44%	61%	54%	48%	23%	58%
Illinois	50%	62%	63%	52%	23%	55%
Pennsylvania	51%	60%	51%	50%	20%	56%
Ohio	44%	66%	53%	50%	22%	61%
NY City	47%	59%	57%	46%	24%	52%
Michigan	47%	64%	53%	49%	27%	57%
Chicago	47%	57%	62%	54%	23%	57%
Massachusetts	42%	58%	55%	45%	17%	51%
Boston	42%	57%	55%	44%	17%	52%
Philadelphia	51%	58%	54%	52%	20%	60%
Washington DC	45%	57%	53%	51%	14%	56%
Detroit	51%	62%	56%	51%	28%	58%
Cleveland	43%	60%	52%	42%	18%	62%
Pittsburgh	49%	63%	52%	55%	24%	65%
Buffalo	47%	68%	52%	56%	27%	64%
Rochester	41%	67%	47%	52%	23%	60%

TABLE 10: TV Shows Watched on a Regular Basis - TOBS, Contd.						
	Nature shows	Instruct./ hobby shows	Movies on TV	Evening sitcoms	Evening drama	Other TV programs
New York	59%	40%	76%	56%	57%	34%
Illinois	55%	40%	70%	61%	60%	33%
Pennsylvania	57%	45%	71%	57%	55%	38%
Ohio	59%	46%	74%	55%	59%	41%
NY City	60%	38%	76%	57%	55%	36%
Michigan	60%	46%	73%	51%	58%	30%
Chicago	59%	37%	72%	59%	63%	38%
Massachusetts	49%	37%	70%	58%	57%	37%
Boston	48%	36%	72%	58%	57%	37%
Philadelphia	55%	44%	76%	58%	59%	38%
Washington DC	55%	42%	71%	53%	52%	41%
Detroit	59%	47%	75%	61%	58%	33%
Cleveland	55%	39%	73%	52%	56%	36%
Pittsburgh	59%	40%	75%	60%	58%	38%
Buffalo	54%	45%	70%	59%	61%	34%
Rochester	60%	43%	76%	60%	61%	35%

TABLE 11: Memberships - TOBs							
	Automobile club[10]	Nature[11] organization	Art gallery or museum	Zoo or botanical garden	Sports club[12]	Gardening club	Other organization
New York	41%	10%	15%	10%	26%	2%	31%
Illinois	30%	8%	14%	12%	29%	3%	37%
Pennsylvania	57%	10%	12%	12%	29%	3%	38%
Ohio	52%	11%	11%	14%	29%	3%	40%
NY City	32%	9%	17%	14%	25%	2%	29%
Michigan	47%	7%	12%	7%	28%	4%	38%
Chicago	35%	7%	14%	14%	28%	4%	39%
Massachusetts	61%	14%	24%	7%	33%	4%	37%
Boston	61%	14%	25%	7%	34%	3%	37%
Philadelphia	52%	10%	19%	14%	31%	4%	38%
Washington DC	47%	12%	19%	9%	28%	3%	38%
Detroit	52%	9%	16%	11%	30%	5%	34%
Cleveland	54%	8%	17%	11%	27%	3%	35%
Pittsburgh	60%	13%	14%	13%	25%	3%	33%
Buffalo	61%	6%	13%	13%	23%	1%	31%
Rochester	56%	11%	17%	12%	27%	3%	30%

Education: TOBs have a significantly higher level of education than other US residents - 36% to 56% of TOBs have completed university (all levels) as opposed to 31% for the total US population. In addition the incidence of TOBs who have not completed high school is hal f that of the US as a whole.

Among TOBs, those from Washington DC are the most educated followed by those from Boston, while the TOBs from Ohio and Michigan are the least educated.

Household income: TOBs are also richer than other US residents, perhaps a consequence of their higher education. On a pro-rated basis (i.e., excluding respondents' who did not know their household income or refused to reveal it), 51% of the TOBs have a household income of $60,000 and over, while only 31% of the US residents as a whole have a household income that falls in that range.

[10] Such as AAA
[11] Such as the Sierra Club
[12] Such as a tennis club, golf club or fitness centre

TABLE 12: Education Completed - TOBs				
	Did not complete high school	Completed high school or higher, but not university	University - BA or equivalent	University - Master's degree or higher
Total US	13%	56%	22%	10%
New York	6%	49%	28%	17%
Illinois	8%	50%	29%	13%
Pennsylvania	6%	52%	25%	17%
Ohio	7%	57%	23%	13%
NY City	7%	47%	28%	18%
Michigan	8%	56%	20%	16%
Chicago	6%	51%	31%	13%
Massachusetts	6%	40%	32%	21%
Boston	6%	39%	32%	22%
Philadelphia	6%	48%	29%	16%
Washington DC	4%	40%	28%	29%
Detroit	7%	56%	25%	12%
Cleveland	5%	52%	30%	13%
Pittsburgh	6%	54%	23%	17%
Buffalo	6%	53%	29%	12%
Rochester	6%	44%	33%	17%

TABLE 13: Household Income - TOBs						
	Under $20,000	$20,000 to under $40,000	$40,000 to under $60,000	$60,000 to under $80,000	$80,000 to under $100,000	$100,000 or more
Total US	17%	28%	23%	14%	7%	11%
New York	10%	24%	20%	17%	11%	18%
Illinois	14%	20%	17%	18%	10%	21%
Pennsylvania	13%	26%	21%	16%	9%	15%
Ohio	11%	22%	30%	16%	6%	14%
NY City	10%	24%	22%	17%	11%	17%
Michigan	10%	21%	23%	20%	7%	19%
Chicago	9%	20%	20%	16%	13%	22%
Massachusetts	10%	21%	22%	16%	13%	18%
Boston	10%	20%	21%	15%	14%	20%
Philadelphia	7%	25%	23%	13%	13%	19%
Washington DC	8%	11%	24%	19%	12%	25%
Detroit	10%	21%	21%	17%	8%	22%
Cleveland	10%	22%	28%	17%	7%	15%
Pittsburgh	12%	23%	25%	20%	9%	12%
Buffalo	15%	29%	23%	14%	8%	11%
Rochester	9%	25%	24%	18%	10%	14%

Age: Most TOBs are older than other US residents. The average age of TOBs varies from a low of 43.5 years for those from Washington DC to a high of 49.2 years for those from Pittsburgh, while the average age of the adult US population is 45.2 years.

In what type of households do they live in? The size of TOB households varies considerably. The TOBs of New York City and Washington DC have the highest proportion of single households and the lowest proportion of households with four or more members. The TOBs of Buffalo, Pittsburgh and Ohio have the lowest proportion of single households and the highest proportion of two-member households.

When compared to other TOBs, or to the US population as a whole, Ohio, Buffalo and Pittsburgh also have the highest proportion of couples and the lowest proportion of singles, while Washington DC, Pittsburgh, New York City, Pennsylvania and Illinois have the lowest proportion of households with children less than 13 years of age (approximately 20%).

TABLE 14: Age - TOBs

	18-25	26-35	36-45	46-55	56-65	66+	Average
Total US	14%	20%	22%	17%	11%	16%	45.2
New York	12%	17%	23%	22%	12%	13%	45.6
Illinois	15%	17%	19%	21%	11%	17%	45.7
Pennsylvania	8%	16%	25%	22%	14%	15%	47.4
Ohio	10%	21%	19%	20%	15%	15%	46.7
NY City	11%	20%	24%	20%	10%	16%	45.5
Michigan	11%	15%	23%	21%	14%	17%	47.2
Chicago	13%	19%	22%	21%	11%	15%	45.1
Massachusetts	11%	17%	25%	18%	14%	16%	46.4
Boston	11%	18%	24%	18%	14%	15%	46.1
Philadelphia	10%	18%	25%	17%	14%	15%	46.1
Washington DC	12%	21%	27%	19%	12%	8%	43.5
Detroit	12%	17%	22%	20%	16%	14%	46.0
Cleveland	10%	16%	22%	18%	18%	16%	47.8
Pittsburgh	11%	10%	23%	19%	16%	21%	49.2
Buffalo	8%	17%	25%	20%	14%	16%	47.4
Rochester	15%	18%	23%	20%	11%	12%	44.4

TABLE 15: Household Size - TOBs Percent of households with.....				
	1 member	2 members	3 members	4+ members
Total US	23%	32%	17%	29%
New York	27%	31%	16%	26%
Illinois	24%	33%	15%	28%
Pennsylvania	23%	34%	15%	28%
Ohio	19%	39%	17%	25%
NY City	31%	28%	17%	23%
Michigan	24%	36%	16%	24%
Chicago	25%	30%	16%	30%
Massachusetts	24%	34%	16%	26%
Boston	24%	35%	17%	25%
Philadelphia	23%	31%	18%	28%
Washington DC	27%	36%	16%	21%
Detroit	22%	34%	18%	26%
Cleveland	26%	32%	14%	27%
Pittsburgh	19%	35%	16%	30%
Buffalo	18%	37%	19%	26%
Rochester	23%	33%	16%	28%

TABLE 16: Household Composition - TOBs										
	Young Singles - No Kids	Young Singles with Kids	Young Couples - No Kids	Young Couples with Kids	Mature Singles - No Kids	Mature Singles with Kids	Mature Couples - No Kids	Mature Couples with Kids	Senior Singles	Senior Couples
Total US	12%	2%	4%	6%	14%	5%	13%	23%	11%	10%
New York	11%	1%	4%	3%	20%	7%	13%	22%	11%	7%
Illinois	16%	1%	3%	3%	13%	4%	13%	25%	10%	12%
Pennsylvania	8%	1%	3%	3%	15%	5%	17%	25%	12%	10%
Ohio	11%	1%	4%	6%	11%	5%	13%	25%	9%	14%
NY City	12%	1%	4%	3%	23%	9%	10%	18%	12%	8%
Michigan	11%	1%	4%	3%	12%	6%	14%	24%	13%	11%
Chicago	13%	2%	4%	3%	15%	5%	12%	27%	9%	11%
Massachusetts	13%	1%	4%	3%	15%	5%	14%	25%	12%	10%
Boston	13%	1%	4%	2%	15%	5%	14%	25%	11%	11%
Philadelphia	11%	1%	5%	3%	13%	7%	14%	24%	13%	9%
Washington DC	13%	2%	5%	2%	22%	5%	17%	20%	7%	7%
Detroit	11%	3%	4%	4%	14%	4%	13%	26%	11%	10%
Cleveland	10%	2%	4%	4%	13%	6%	12%	24%	13%	14%
Pittsburgh	10%	1%	2%	3%	9%	3%	16%	28%	13%	14%
Buffalo	7%	1%	3%	6%	13%	8%	14%	23%	9%	15%
Rochester	16%	1%	2%	4%	12%	6%	16%	25%	10%	7%

With the exception of the TOBs from New York state and New York City, TOBs have a higher incidence of two-income households than other US households raging from a low of 40% for the TOBs of Washington DC to a high of 48% for the TOBs of Pittsburgh (as opposite to 40% for the US as a whole).

PART 2: THE FUTURE

By the year 2025, the US is forecast to have 27% more residents aged 18 years or older than it did at the end of 1999 and 31% more TOBs. As such, TOBs will increase in importance as far as the whole US is co ncerned.

TABLE 17: US and TOB Population in 2025
Residents aged 18 years or older

	TOB Population			Total Population		
	1999	2025	Rate of Change	1999	2025	Rate of Change
Total US	87,863,813	115,303,467	31.2%	200,426,465	254,266,390	26.9%
New York	6,849,616	7,535,416	10.0%	13,672,690	14,926,308	9.2%
Illinois	4,469,703	5,379,768	20.4%	8,857,995	10,059,636	13.6%
Pennsylvania	4,401,587	4,397,216	-0.1%	10,043,707	9,899,077	-1.4%
Ohio	3,909,850	4,256,005	8.9%	8,662,021	9,058,238	4.6%
NY City	3,750,376	4,073,441	8.6%	6,568,330	7,170,204	9.2%
Chicago	3,092,929	3,662,261	18%	5,753,979	6,534,449	13.6%
Michigan	3,368,676	3,659,201	9%	7,265,626	7,659,356	5.4%
Massachusetts	2,702,411	3,050,388	12.9%	4,890,557	5,335,201	9.1%
Boston	2,323,248	2,620,509	12.8%	4,112,705	4,486,659	9.1%
Washington DC	1,808,628	2,262,779	25.1%	3,498,327	4,399,902	25.8%
Detroit	1,754,527	1,953,661	11.3%	3,335,000	3,515,511	5%
Philadelphia	1,919,204	1,923,124	0.2%	3,701,082	3,647,475	-1.4%
Cleveland	911,921	994,764	9.1%	1,673,450	1,749,931	4.6%
Pittsburgh	833,930	842,147	1.0%	1,824,435	1,798,011	-1.4%
Buffalo	434,130	487,446	12.3%	872,430	952,373	9.2%
Rochester	408,734	445,324	9.0%	800,664	874,031	9.2%

On the other hand, the TOBs from the selected states and cities of Table 17 are expected to experience growths ranging form -0.1%, for the TOBs of Pennsylvania, to 25.1% for the TOBs of Washington DC, while the total population of these regions is expected to experience growth rates between -1.4% for Pennsylvania, Philadelphia and Pittsburgh to 25.8% for Washington DC.

As such, with the exception of New York City, Rochester and Washington DC, TOBs will increase in significance within the markets of the states/cities shown in Table 17. However, given that most of the states or cities listed in Table 17 are experiencing either no growth or a declining adult population, their respective TOB populations will not increase as much as in other parts of the US.

TABLE 18: Activities Participated in on a Frequent Basis when not Travelling - TOBs Rate of Change 1999-2025								
	New York	Rochester	Buffalo	NY City	Michigan	Detroit	Ohio	Cleveland
Go to a park	6%	5%	6%	4%	11%	8%	0%	0%
Gardening	17%	22%	18%	6%	12%	23%	10%	11%
Fish	0%	12%	5%	2%	1%	-1%	7%	-1%
Hunt	3%	5%	3%	7%	7%	-1%	-12%	-15%
Camp/hike/backpack	10%	1%	8%	13%	6%	9%	-6%	13%
Canoeing/kayaking	14%	6%	4%	16%	0%	5%	-8%	-1%
Sailing/ boating	10%	15%	16%	9%	3%	7%	6%	3%
Biking	9%	-3%	3%	9%	1%	-10%	0%	1%
Cross-country ski	-2%	14%	9%	9%	-7%	-14%	9%	11%
Downhill ski/snowboard	7%	2%	7%	15%	-4%	-10%	35%	1%
Snowmobiling	-1%	11%	0%	6%	18%	15%	7%	-2%
Ice-skating	-3%	3%	1%	3%	-15%	-14%	-7%	-2%
Golf	18%	6%	13%	12%	4%	9%	7%	9%
Racquet sports	2%	5%	19%	4%	-6%	-10%	0%	-5%
Team sports	3%	-8%	-10%	9%	-1%	-8%	-3%	4%
Exercise	10%	11%	13%	10%	13%	18%	15%	12%
Swim	7%	3%	9%	5%	14%	21%	2%	4%
Dancing	4%	9%	-2%	8%	-2%	-1%	-6%	4%
Dine in restaurants	10%	10%	17%	9%	7%	6%	12%	10%
Gambling at casinos	-2%	0%	6%	-5%	8%	-6%	-2%	9%
Amusement/theme park	2%	-2%	16%	4%	13%	17%	8%	7%
Professional sport event	0%	1%	2%	4%	5%	4%	-6%	2%
Zoo or botanical garden	3%	2%	22%	3%	12%	21%	0%	8%
Live theatre	12%	5%	26%	12%	9%	16%	11%	15%
Live ballet	21%	5%	30%	17%	21%	33%	9%	15%
Opera	27%	-12%	1%	25%	17%	12%	16%	16%
Music concert	14%	9%	13%	16%	7%	12%	4%	11%
Art gallery or show	10%	8%	33%	14%	40%	43%	8%	14%
Museum	9%	4%	24%	12%	29%	30%	17%	12%
Hotel/B&B in own city	4%	18%	12%	4%	-3%	1%	3%	-6%

TABLE 18: Activities Participated in on a Frequent Basis when not Travelling – TOBs Rate of Change 1999-2025, Contd.								
	Pennsy-lvania	Pitts-burgh	Philadel-phia	Washin-gton DC	Massa-chusetts	Boston	Illinois	Chicago
Go to a park	-13%	-7%	-9%	19%	3%	4%	7%	10%
Gardening	1%	0%	0%	25%	17%	17%	15%	18%
Fish	-12%	-9%	3%	12%	10%	6%	26%	43%
Hunt	-19%	-4%	-14%	7%	37%	40%	13%	33%
Camp/hike/backpack	-14%	-23%	-1%	19%	8%	8%	20%	29%
Canoeing/kayaking	-19%	-4%	-16%	19%	1%	1%	5%	-1%
Sailing/ boating	-12%	2%	2%	22%	4%	5%	10%	12%
Biking	-4%	-7%	-1%	27%	9%	9%	12%	12%
Cross-country ski	-17%	-21%	3%	-3%	27%	29%	2%	2%
Downhill ski/snowboard	-13%	-14%	-6%	19%	0%	2%	4%	7%
Snowmobiling	-31%	-22%	-10%	52%	7%	0%	12%	22%
Ice-skating	-19%	-16%	-14%	21%	4%	4%	4%	3%
Golf	-4%	12%	-4%	16%	13%	11%	31%	22%
Racquet sports	-2%	6%	-6%	30%	16%	17%	8%	7%
Team sports	-17%	-16%	-3%	19%	9%	9%	3%	6%
Exercise	4%	1%	2%	23%	15%	15%	19%	21%
Swim	-4%	-1%	0%	24%	6%	5%	22%	25%
Dancing	-4%	-6%	-5%	24%	13%	14%	27%	30%
Dine in restaurants	-2%	1%	0%	24%	15%	15%	22%	21%
Gambling at casinos	-5%	-5%	0%	9%	9%	8%	18%	21%
Amusement or theme park	-8%	0%	-8%	18%	7%	11%	3%	6%
Professional sport event	-6%	0%	-4%	21%	21%	22%	5%	6%
Zoo or botanical garden	-13%	-14%	-8%	18%	31%	29%	17%	8%
Live theatre	4%	7%	6%	25%	23%	25%	19%	11%
Live ballet	5%	11%	6%	24%	3%	3%	18%	5%
Opera	5%	-7%	7%	32%	8%	8%	17%	7%
Music concert	1%	1%	4%	32%	21%	24%	28%	22%
Art gallery or show	4%	5%	2%	35%	31%	31%	14%	15%
Museum	1%	6%	0%	31%	21%	21%	11%	11%
Hotel/B&B in own city	-20%	-9%	-7%	26%	8%	9%	-2%	2%

As Table 18 shows, the TOBs of Pennsylvania, Pittsburgh and Philadelphia will become in 2025 considerably less active when they are not travelling. Most of the activities that the TOBs do on a frequent basis when not travelling decline with the exception of live theatre and ballet. For the other TOBs, those from Washington DC, Illinois and Chicago will become considerably more active in every activity, with

the exception of cross-country skiing for the TOBs from Washington DC. No other generalization is possible for all the regions listed on Table 16, except to note that the TOBs will become even more active in cultural performances in 2025.

Table 19 sheds some light on why the TOBs of some states, such as Washington DC, are expected to become more active and the TOBs of other states or cities less active. The average age of the TOBs from New York City, Washington DC and Boston is actually expected to decline in 2025, while the average age of the TOBs of any other state or city cited in Table 19 is expected to increase with Pittsburgh, Ohio and Philadelphia experiencing the largest increases. Based on the observations of tables 17 and 19, it would appear that for Pittsburgh, Philadelphia and Pennsylvania their older residents would most likely be migrating south to warmer climates.

TABLE 19: Average Age, TOBs

	1999	2025	Rate of Change
Total US	45.2	48.4	7.1%
New York	45.6	47.5	4.2%
Rochester	45.7	48.0	5.0%
Buffalo	47.4	51.0	7.6%
NY City	46.7	46.3	-0.9%
Michigan	45.5	49.8	9.5%
Detroit	47.2	50.2	6.4%
Ohio	45.1	50.4	11.8%
Cleveland	46.4	50.1	8.0%
Pennsylvania	46.1	50.4	9.3%
Pittsburgh	46.1	52.3	13.4%
Philadelphia	43.5	48.2	10.8%
Washington DC	46.0	45.4	-1.3%
Massachusetts	47.8	49.3	3.1%
Boston	49.2	49.0	-0.4%
Illinois	47.4	48.7	2.7%
Chicago	44.4	47.7	7.4%

The number of TOBs that will be taking overnight trips anywhere in the world in 2025 will increase, but not as much as in other parts of the US.

TOBs from Philadelphia will experience no increase in their number of travellers, while the traveller-TOBs from Washington DC will experience the largest increase (24%).

TABLE 20: Number of TOB travellers			
	1999	2025	Rate of change
Total US travellers	152,729,521	194,126,532	27%
New York	5,776,861	6,413,726	11%
Rochester	349,753	387,751	11%
Buffalo	362,429	407,731	12%
NY City	3,163,211	3,431,323	8%
Michigan	2,840,059	3,114,106	10%
Detroit	1,492,253	1,699,243	14%
Ohio	3,350,477	3,645,748	9%
Cleveland	773,164	837,980	8%
Pennsylvania	3,641,040	3,660,804	1%
Pittsburgh	687,035	700,995	2%
Philadelphia	1,665,025	1,666,815	0%
Washington DC	1,570,035	1,944,776	24%
Massachusetts	2,327,954	2,681,873	15%
Boston	1,982,769	2,288,140	15%
Illinois	3,824,971	4,529,829	18%
Chicago	2,604,038	3,073,626	18%

Table 21 shows the TOBs' top ten leisure destinations in 2025. For each state or city the first column depicts the proportion of TOBs who are expected to visit the destination and the second column how this proportion is expected to change over time.

Ontario is in the top ten list of all TOBs with the exception of those from Massachusetts, Boston and Illinois. However, as it can be seen in the table, for Ontario all of these markets are expected to be either stagnant or declining over the period under consideration. Another destination that is expected to experience either no growth or a negative growth is the TOBs own stat e of residence.

The destinations that are expected to experience significant growth are those that offer "warmth", such as Florida, California and Mexico or the Caribbean - an observation that is consistent with the aging of the TOBs. As such, given the preference profile of TOBs, if Ontario is to reverse this trend it may need to enter into innovative product development that provides the TOBs with the cultural experience that they seek, while at the same time providing them with the convenience, piece of mind and warmth that they will also be seeking. Perhaps the cultural tourism industry could borrow from the gaming industry and develop art performance centres similar to "casino-hotels" or Las Vegas - but in this case it will be "opera-hotels" and art performance destination complexes.

TABLE 21: The Top 10 Overnight Leisure Destinations for TOBs								
	Place of Residence							
	New York State		Rochester		Buffalo		New York City	
Destination	% of TOBs Visiting the Destination in 2025	Rate of Change 2025/99	% of TOBs Visiting the Destination in 2025	Rate of Change 2025/99	% of TOBs Visiting the Destination in 2025	Rate of Change 2025/99	% of TOBs Visiting the Destination in 2025	Rate of Change 2025/99
Own state	45%	1%	48%	-3%	51%	2%	41%	4%
California	19%	96%	18%	77%	13%	48%	23%	98%
Las Vegas	11%	66%	14%	40%	14%	91%	11%	74%
Florida	39%	72%	41%	79%	36%	46%	37%	78%
Other state	56%	70%	66%	59%	56%	47%	49%	86%
Ontario	20%	1%	58%	1%	49%	1%	10%	-5%
UK/Europe	16%	7%	14%	20%	13%	11%	22%	6%
Mexico/ Caribbean	22%	130%	15%	277%	13%	123%	25%	105%
Other overseas	13%	5%			5%	-5%	17%	2%
Texas			11%	46%				
New York								
Quebec	10%	-4%	12%	2%	9%	1%	9%	3%

TABLE 21: The Top 10 Overnight Leisure Destinations for TOBs - Contd								
	Place of Residence							
	Michigan		Detroit		Ohio		Cleveland	
Destination	% of TOBs Visiting the Destination in 2025	Rate of Change 2025/99	% of TOBs Visiting the Destination in 2025	Rate of Change 2025/99	% of TOBs Visiting the Destination in 2025	Rate of Change 2025/99	% of TOBs Visiting the Destination in 2025	Rate of Change 2025/99
Own state	57%	1%	64%	6%	43%	-1%	44%	-1%
California	20%	42%	23%	61%	14%	76%	18%	50%
Las Vegas	21%	45%	20%	29%	19%	106%	21%	92%
Florida	40%	49%	45%	40%	34%	83%	34%	74%
Other state	60%	51%	59%	38%	64%	69%	59%	62%
Ontario	39%	2%	47%	2%	22%	-4%	38%	-1%
UK/Europe	14%	24%	15%	13%	10%	25%	12%	13%
Mexico/ Caribbean	13%	139%	14%	116%	17%	302%	18%	206%
Texas	17%	41%	13%	44%	15%	155%	11%	74%
New York	18%	51%	16%	21%	29%	100%	32%	53%

TABLE 21: The Top 10 Overnight Leisure Destinations for TOBs – Contd								
	Place of Residence							
	Pennsylvania		Pittsburgh		Philadelphia		Washington DC	
Destination	% of TOBs Visiting the Destination in 2025	Rate of Change 2025/99	% of TOBs Visiting the Destination in 2025	Rate of Change 2025/99	% of TOBs Visiting the Destination in 2025	Rate of Change 2025/99	% of TOBs Visiting the Destination in 2025	Rate of Change 2025/99
Own state	38%	2%	44%	-4%	41%	5%	38%	-5%
California	18%	83%	21%	56%	18%	55%	20%	86%
Las Vegas	13%	98%	15%	59%	12%	73%		
Florida	33%	91%	42%	78%	36%	79%	34%	71%
Other state	59%	92%	65%	70%	61%	105%	60%	81%
Ontario	15%	0%	28%	-5%	11%	-2%	11.2%	3%
UK/Europe	12%	6%	13%	5%	16%	0%	21%	1%
Mexico/ Caribbean	15%	137%	17%	284%	21%	94%	20%	66%
Other overseas	9%	2%	9%	7%	11%	2%	18%	18%
Texas							15%	86%
New York	35%	65%	32%	35%	42%	76%	33%	96%

TABLE 21: The Top 10 Overnight Leisure Destinations for TOBs – Contd								
	Place of Residence							
	Massachusetts		Boston		Illinois		Chicago	
Destination	% of TOBs Visiting the Destination in 2025	Rate of Change 2025/99	% of TOBs Visiting the Destination in 2025	Rate of Change 2025/99	% of TOBs Visiting the Destination in 2025	Rate of Change 2025/99	% of TOBs Visiting the Destination in 2025	Rate of Change 2025/99
Own state	41%	-1%	40%	0%	45%	0%	39%	-1%
California	23%	90%	23%	90%	18%	83%	19%	70%
Las Vegas	13%	123%	14%	140%	24%	65%	27%	70%
Florida	36%	76%	35%	75%	34%	71%	38%	81%
Other state	59%	77%	57%	81%	64%	57%	60%	74%
Ontario							13%	0%
UK/Europe	27%	5%	28%	5%	13%	-6%	15%	-1%
Mexico/ Caribbean	18%	122%	20%	123%	16%	136%	21%	128%
Other overseas	18%	12%	17%	11%	12%	0%	14%	3%
Texas					12%	21%		
New York	43%	64%	42%	64%	15%	49%	17%	38%
Quebec	14%	-2%	15%	-1%				

TABLE 22: Proportion of TOBs with children less than 18 years of age			
	Year		Rate of Change
Place of Residence	1999	2025	
New York	28%	25%	-11%
Rochester	29%	26%	-9%
Buffalo	33%	29%	-13%
NY City	26%	24%	-7%
Michigan	28%	24%	-15%
Detroit	31%	24%	-23%
Ohio	31%	25%	-20%
Cleveland	30%	25%	-17%
Pennsylvania	28%	22%	-21%
Pittsburgh	28%	22%	-21%
Philadelphia	29%	24%	-16%
Washington DC	26%	21%	-18%
Massachusetts	29%	24%	-17%
Boston	28%	23%	-18%
Illinois	26%	21%	-18%
Chicago	29%	24%	-15%

Another approach to dealing with these stagnant markets that does not involve product development might be the extension of the season of the performing arts, especially opera, ballet and classical concerts, to cover the summer. This will provide TOB travellers with an opportunity not readily available in other jurisdictions and as such provide Ontario with a competitive advantage in this area.

The absolute as well as the relative size of TOBs with children less than 18 years of age will decrease over the period under consideration, except for the TOBs from Chicago and Washington DC whereby only their relative size declines while their absolute number increases marginally. New York City and Rochester will experience the lowest decline of this market segment and Detroit, Pennsylvania and Pittsburgh the largest.

For the TOBs from New York State, New York City, Washington DC, Massachusetts, Boston, Illinois and Chicago all types of travel experiences sought by them during overnight trips will increase in 2025 (see Table 23). For the remaining TOBs in Table 23 there will be a decline in the participation rates in

almost all of the experiences sought during overnight trips. This is the result of a declining and aging population base.

TABLE 23: Rate of change in the experiences that TOBs travellers will be seeking during overnight trips, 2025/1999

Travel Experiences	Total US Travel-lers	New York	Roches-ter	Buffalo	NY City	Michi-gan	Detroit	Ohio	Cleve-land
Rest, relax, recuperate	22%	25%	-73%	-75%	130%	7%	-24%	-40%	-58%
Quality time with family away from home	22%	16%	-73%	-74%	132%	3%	-23%	-35%	-54%
Visit friends/relatives	25%	41%	-72%	-74%	148%	11%	-19%	-33%	-56%
Intimacy and romance	16%	12%	-74%	-77%	104%	-3%	-31%	-53%	-58%
Experience different cultures	29%	65%	-68%	-68%	143%	13%	-23%	-43%	-50%
Visit historical sites/places	33%	33%	-72%	-71%	145%	8%	-22%	-37%	-55%
Time with good friends	23%	19%	-71%	-75%	129%	6%	-18%	-47%	-55%
See natural wonders/sites	28%	23%	-71%	-72%	163%	6%	-26%	-43%	-54%
Experience the good life	27%	17%	-71%	-77%	121%	-2%	-22%	-40%	-47%
Visit casinos and gamble	21%	2%	-72%	-74%	104%	9%	-23%	-47%	-56%
Visit popular, trendy place	14%	22%	-71%	-76%	107%	1%	-26%	-45%	-55%
Be at familiar and safe place	18%	18%	-73%	-77%	120%	5%	-27%	-33%	-59%
Adventure/excitement	19%	31%	-73%	-74%	111%	-7%	-29%	-43%	-59%
City life (nightlife/ shop/museum)	25%	33%	-70%	-75%	146%	11%	-20%	-40%	-56%
Escape winter weather	18%	7%	-71%	-77%	134%	6%	-19%	-38%	-52%
Experience unspoiled nature	25%	34%	-71%	-71%	142%	-9%	-31%	-39%	-55%
Participate in hobby/sport	32%	17%	-72%	-74%	134%	-19%	-24%	-6%	-47%
Hands-on learning experience	30%	37%	-74%	-60%	129%	-5%	-38%	-60%	-54%
Religious/spiritual purpose	-19%	0%	0%	0%	0%	0%	0%	-57%	-57%
Other	36%	80%	-67%	-76%	202%	174%	0%	-31%	-70%

TABLE 23: Rate of change in the experiences that TOBs travellers will be seeking during overnight trips, 2025/1999 - Contd								
Travel Experiences	Pennsy-lvania	Pitts-burgh	Philadel-phia	DC	Massa-chusetts	Boston	Illinois	Chicago
Rest, relax, recuperate	-8%	-49%	-20%	51%	30%	51%	81%	57%
Quality time with family away from home	-9%	-54%	-20%	54%	21%	45%	74%	54%
Visit friends/relatives	5%	-52%	-18%	50%	28%	65%	87%	54%
Intimacy and romance	-16%	-56%	-26%	26%	22%	49%	58%	51%
Experience different cultures	-14%	-49%	-17%	66%	24%	62%	77%	64%
Visit historical sites/places	18%	-46%	-13%	53%	31%	56%	71%	55%
Time with good friends	-2%	-55%	-18%	49%	16%	42%	106%	63%
See natural wonders/sites	8%	-49%	-15%	63%	20%	43%	73%	63%
Experience the good life	-5%	-49%	-14%	58%	25%	57%	68%	51%
Visit casinos and gamble	-1%	-42%	-21%	32%	12%	53%	84%	69%
Visit popular, trendy place	-10%	-48%	-27%	71%	7%	100%	85%	59%
Be at familiar and safe place	-5%	-56%	-17%	62%	20%	47%	89%	44%
Adventure/excitement	-7%	-52%	-24%	38%	21%	46%	59%	50%
City life (nightlife/ shop/museum)	1%	-47%	-20%	60%	20%	52%	77%	52%
Escape winter weather	-19%	-51%	-7%	49%	23%	53%	83%	61%
Experience unspoiled nature	1%	-49%	-19%	63%	24%	43%	81%	64%
Participate in hobby/sport	-17%	-52%	-19%	89%	16%	33%	68%	53%
Hands-on learning experience	-27%	-55%	-5%	85%	6%	36%	63%	53%
Religious/spiritual purpose	0%	0%	0%	0%	0%	0%	-5%	-5%
Other	-34%	-36%	-25%	55%	0%	155%	15%	15%

For the US travellers as a whole, participation in all of the outdoor activities listed in the Appendix, with the exception of windsurfing, hand gliding, soccer and scuba diving, will increase in 2025 by an average of 18%. Similarly, participation in all of the cultural and entertainment activities listed in the Appendix will increase by an average of 26%.

In contrast, for the TOB travellers from Buffalo, Rochester, Pittsburgh and Cleveland participation in all of the outdoor and cultural/entertainment activities listed in the Appendix will decline by an average of -61%, -62%, -38% and -46%, respectively, for the outdoor activities and by -74%, -68%, -47% and -51%, respectively, for the cultural/entertainment activities.

TABLE 24: Average Rate of change in the activities that TOB travellers will participate in while on overnight trips 2025/1999		
Place of Residence	Outdoor Activities	Cultural & Entertainment Activities
Total US travellers	18%	26%
New York	29%	40%
Rochester	-62%	-68%
Buffalo	-61%	-74%
NY City	117%	143%
Michigan	-3%	6%
Detroit	-21%	-24%
Ohio	-42%	-36%
Cleveland	-46%	-51%
Pennsylvania	-22%	-13%
Pittsburgh	-38%	-47%
Philadelphia	-23%	-17%
Washington DC	36%	47%
Massachusetts	15%	27%
Boston	32%	59%
Illinois	53%	81%
Chicago	45%	63%

The picture is very similar for the TOB travellers from Michigan, Detroit, Ohio, Pennsylvania and Philadelphia, but with fewer activities declining.

For the TOBs from Michigan, the only outdoor activities that will not decline are:

- motorcycling as an overnight touring trip,
- white water rafting,
- see northern lights or other arctic experiences,
- work out in a fitness centre,
- jogging outdoors,
- going on picnics in park settings,
- hot air ballooning,
- play football,
- cross country skiing both as a day activity and as an overnight touring trip
- snowboarding and
- swimming in oceans

with snowboarding experiencing the largest increase (256%). However, on average, participation in outdoor activities by Michigan TOB travellers will decline by -3%.

For the TOBs from Detroit, the only outdoor activity that will not decline is hot air ballooning, while participation in all of the cultural/entertainment activities listed in the Appendix will decline, on average, by -24%.

For the TOBs from Ohio, the only outdoor activities that will not decline are:

- Whale watching
- see northern lights or other arctic experiences,
- Ice fishing
- hot air ballooning, and
- snowboarding

while their participation in all of the cultural/entertainment activities listed in the Appendix will decline with the exception of attending carnivals such as Mardi Gras, Caribana or Rio de Janeiro's.

For the TOBs of Pennsylvania, the only outdoor activities that will not decline are:

- Wildflower/flora viewing
- Kayaking or canoeing
- see northern lights or other arctic experiences,
- Fishing in fresh water
- Going on picnics in park settings
- Golfing - take a packaged golf tour to play on various courses
- Going bowling

while the only cultural/entertainment activities that will not decline are:

- Attend Pow Wows or other aboriginal celebrations
- Visit an Aboriginal attraction such as the Indian Museum of North America or the Polynesian Cultural Centre in Hawaii
- Visit art galleries
- Visit children's museums
- Visit general history museums
- Visit science or technology museums
- Going to the opera
- Attend classical concerts
- Visit historic sites such as the Statue of Liberty, the Acropolis, Old Fort William
- Visit garden attractions such as Cypress Gardens
- Going to restaurants that offer local or regional cuisine, and
- Shop or browse at local arts & crafts studios and exhibitions

For the TOBs from Philadelphia, the only outdoor activity that will not decline is "see northern lights or other arctic experiences", while the only cultural or entertainment activities that will not decline are:

- Visit an Aboriginal attraction such as the Indian Museum of North America or the Polynesian Cultural Centre in Hawaii
- French Canadian cultural experience
- Going to the opera
- Attend classical concerts
- Visit musical attractions such as the Rock 'n Roll Museum or Jazzland

Finally, for the TOB travellers from Washington DC, Boston, Illinois and Chicago participation in all of the outdoor and cultural/entertainment activities listed in the Appendix will increase, with the exception of motorcycling as an overnight touring trip for the TOBs of Washington DC (it declines by 19%). The average rates of growth for these TOBs are listed in Table 24.

APPENDIX

Outdoor Activities	Cultural & Entertainment Activities
Bird watching	Aboriginal cultural experience in a remote setting
Whale watching	Pow Wow/aboriginal celebration
Other wildlife viewing	Aboriginal attraction
Wildflowers/flora viewing	French Canadian cultural experience
Recreational biking	Musical festivals
Mountain biking	International film festivals
Biking - overnight touring trip	Literary festivals/events
Motorcycle day excursion on overnight tour	Theatre festivals
Motorcycle overnight touring trip	Carnivals such as Mardi Gras or Rio's
Kayaking or canoeing	Western theme events such as the Calgary Stampede
Motor boating	Farmers' fairs or markets
Sailing	Local festivals or fairs
Wind surfing	Art galleries
White water rafting	Children's museums
Ice climbing	General history museums
Rock climbing	Science/technology museums
Dog sledding	Opera
See northern lights/arctic	Ballet/danse performances
Fishing - fresh water	Theatre
Fishing - salt water	Concerts - classical
Ice fishing	Concerts - jazz
Work out in fitness centre	Concerts - rock & roll/popular
Jogging outdoors	Musical attractions
Picnics in park settings	Historical town with re-enactments
Golf - occasional on trip	Historic sites
Golf - stay at a golf resort	Movie theme parks
Golf - packaged golf tour	Science/technology theme parks
Hang-gliding	Amusement parks like Disneyland
Hike/back-pack in wilderness	Garden attractions
Horseback riding	Botanical gardens
Hot air ballooning	Planetariums
Hunt - big game	Zoos
Hunt - birds/small game	Aquariums
Parachuting	Natural wonders
Bungee jumping	Auto races - spectator
Play baseball/softball	Prof'l baseball - spectator
Play basketball	Prof'l basketball - spectator
Going bowling	Prof'l figure skating - spectator
Play chess or backgammon	Prof'l football - spectator
Curling	Prof'l golf - spectator
Play football	Prof'l ice hockey - spectator
Play ice hockey	Horse races
Play squash	National/international sports
Play soccer	Amateur sports/arts/hobby
Play tennis	Recreational dancing
Play volleyball	Casinos

Ice skating	Local outdoor cafes
In-line/roller skating	Movies
Ski - cross country	Restaurant dining - local cuisine
Ski - cross country tour	Restaurant dining - internationally acclaimed
Ski - downhill	Shop book or music stores
Heli-skiing	Shop antiques
Snowboarding	Shop retail gourmet foods
Snowmobiling - day use	Shop local arts & crafts
Snowmobiling - overnight touring	Shop clothing/shoes/jewellery stores
Sunbath or sit on a beach	Pick-your-own farms
Scuba diving	Read for relaxation on trip
Swimming in lakes	
Swimming in oceans	